

0910.05 Disposing of Records

Issued January 6, 1997

SUBJECT: Disposing of Records.

APPLICATION: Executive Branch Departments and Sub-units.

PURPOSE: To instruct State agencies on how to dispose of records after assuring compliance with all administrative, fiscal, legal and historical requirements.

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SUMMARY: The Retention and Disposal Schedule prescribes how long an agency must retain each specific type of record that it uses. As records become due for disposal, they must be disposed of in the proper manner and at the proper time. This procedure informs agencies how they may accomplish an efficient and systematic disposal of records that are stored in the office and at the State Records Center.

APPLICABLE FORMS: DMB-504, Retention and Disposal Schedule.
DMB-511, Records Disposal Notice.

PROCEDURES:

General Information:

- Official State agency records must be listed on an agency Retention and Disposal Schedule or General Records Schedule, and may be disposed of only in accordance with provisions of the appropriate schedule.
- Non-record items (see definition in the Glossary) may be disposed of by an agency after they have fulfilled immediate needs in the office.
- Disposal of a record means that the record either is to be destroyed or transferred to the Bureau of History, Department of State, for possible preservation in the State Archives.

Agency:

- In some instances, official records complete their required retention periods while being kept in the office. In accordance with the Retention and Disposal Schedule, the agency may dispose of these records either by destroying them or by transferring them directly to the State Archives.
 - Destruction of State records may be accomplished by having them shredded at the Confidential Records Destruction operation of the Materials Management Services, Office Services Division, DMB. Information on this subject may be obtained by referring Materials Management Services Operative Guide 0340.07, or by calling (517) 334-6836.
 - Direct transfer of records to the State Archives may be accomplished by means of Procedure 0920.01.

Records Center:

- At the beginning of each calendar year, reviews its holdings and prepares Records Disposal Notices for each agency that has records which are due for disposal. The completed notices are sent to the State Archives in April.

State Archives:

- Reviews the Records Disposal Notices for selection of records which may have possible archival value. By November 30, returns the Records Disposal Notices to the Records Center with a listing of those records which are to be transferred to the State Archives.

Records Center:

- Distributes individual Records Disposal Notices to the respective Departments' Records Management Officers, for review and approval.

Records Management Officer:

- Secures necessary approvals and returns signed Records Disposal Notices to the State Records Center within 30 days.

Records Center:

- Following return of the approved Records Disposal Notices, arranges for destruction of the appropriate records at no cost to the agencies. (Others may be transferred to the State Archives, for review toward possible preservation as archival/historical records.)
- If an agency fails to return its Records Disposal Notice in a timely manner, may remove the records which are listed on the Disposal Notice from storage, and return them to the agency.

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